Maintaining Contracts in DMT

IROC Dispatch Training Instructor Guide: Advanced Course

Developed by Cask LLC
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Contents

Overview

This instructor guide is intended to be used with the PowerPoint document for Maintaining Contracts in DMT. As you click through the slides, use the text included here to provide additional information. The student guide follows the same format; encourage students to follow along and make notes.

Objectives

Upon completion of this unit, students will understand how to:

- Create a contract within IROC.
- View and edit existing contracts.
- Modify the managing dispatch center for a contract.
- Add or remove resource managed organizations and direct access organizations.
- Add or remove resources to or from a contract.
- Enable or disable a contract.
- Remove or restore a contract.

Presentation

Slide 1: Introduction

Welcome students to the class and explain:

- This section of the advanced user course introduces you to managing contracts in IROC.
- Only dispatch managers can create and maintain contracts for their current dispatch center within the IROC Data Management Tool, or DMT.
- During this section of the course, you will see how the knowledge you gained from the "Navigating the DMT" video and "Managing Records in DMT" can be put into action.
- You may wish to follow along in your student guide as we work through this section.

Slide 2: Course Objectives

Review the objectives for this training as posted on Slide 2 and on the preceding page.

Explain: Dispatchers can only view contracts. You must be a dispatch manager to create, view, or modify contracts in DMT.

## Slide 3: Navigating to the Contracts Modules

Explain: Multiple contracts modules are available under the **My IROC** application in the application navigator.

- The **My Direct Access Contracts** module contains a list of contracts for which your current dispatch center has direct access to the listed resources.
- The **My Resource Managed Contracts** module contains contracts for which your current dispatch center can manage listed resources.
- The **My Contracts** module contains contracts for which your current dispatch center is listed as the managing dispatch center.

You may want to remind students:
- You can set your current dispatch center by navigating to **My Dispatch Organizations** under the **My IROC** application and then selecting the dispatch center and clicking **Make Current Dispatch**.
- For more information, refer to "Managing Records in DMT."

Slide 4: Creating a New Contract
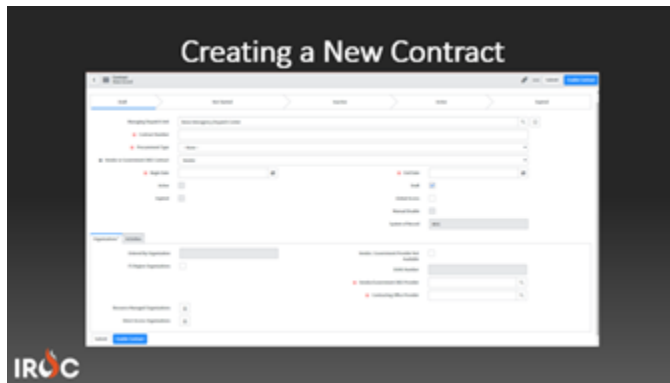
Note: As you demo creating a contract in IROC, illustrate how to right-click in the header bar and click **Save** to save your work as you go.

Remind students:

- Grayed-out fields in IROC cannot be modified.
- Any item marked with an asterisk indicates a required field. A contract cannot be saved or enabled until all required fields are completed.

Show how to create a new contract:

1 Choose any of the **Contracts** modules from the application navigator and click **New** at the top of the main content frame.

2 In the Contract: New Record screen, the **Managing Dispatch Unit** defaults to your current dispatch center. To change it, click the **Search** icon or perform a type-ahead search.

- This field is limited to those organizational units for which you are a dispatch manager.
- A contract can have only one managing dispatch center.

3 Enter the **Contract Number** provided by the contracting office.

- Contract numbers must be unique and follow this format: 2-character agency code – 4-character office code – 1-character procurement type – 4-digit fiscal year – 4-digit sequential number.
- The IROC system does not enforce the contract number format.

4 Select the **Procurement Type:**

- Agreement
- Call When Needed
- Exclusive Use
- Incident Blanket Purchase Agreement

5 Indicate whether the contract is with a **Vendor** or a **Government Non-dispatch Organization**.

6 Enter the contract **Begin Date** and **End Date**.

7 Point out the checkboxes in the middle part of the screen:

- IROC will automatically set the contract to **Active** once the start date has passed and to **Expired** once the end date has passed.
- The **Draft** checkbox will remain checked until you click **Enable Contract**.
- Check **Global Access** if the contract is set up so that all dispatch centers can fill requests with resources from this contract.

8 When done entering all information, you can click **Submit** to save the information, click **Complete Draft** to submit all information, or **Enable Contract** to save the information and enable the contract.

Slide 5: The Organizations Tab

Explain: On the Organizations tab, you can set the vendor/government provider and contracting resource provider, as well as add resource managed and direct access organizations.

Show how to complete the information on the Organizations tab.

1   Choose a **Vendor/Government Provider** from the list of available organizations.

- If your provider is not listed, check the **Vendor/Government Provider Not Available** box and enter a provider that needs to be entered into IROC.
- To add supporting documentation, simply click the **Attachment** (paperclip) icon in the header bar.
- If the vendor is not available, the contract cannot be moved out of the draft stage.

2   Choose a **Contracting Office Provider** from the list of government non-dispatch organizations.

3   Complete the remaining fields as needed:

- Check **FS Region Organizations** to limit organizations available to Forest Service regional offices.
- Click the **Lock** icon by **Resource Managed Organizations** to select one or more organizations that can add or remove resources to the contract. Dispatch managers at organizations listed under the **Resource Managed Organizations** for a contract can add or remove resources to or from that contract.
- In the screenshot, we clicked the **Lock** icon to edit the Resource Managed Organizations field.
- Click the Lock icon by **Direct Access Organizations** to select one or more organizations that can directly access resources on the contract. Dispatchers at units listed under **Direct Access Organizations** can use resources from the contract to fill requests.

Explain:

- When you are done with all changes on the Contract: New Record screen, click **Submit** to save the contract record in IROC. Submitting a contract will place it in draft stage.
- You can also click **Enable Contract** to save your contract in IROC and place it into active stage, as long as the begin date for the contract has passed.
- Once a contract has been created, the Activities tab will show all activity related to this contract.

Slide 6: Viewing or Editing Existing Contracts
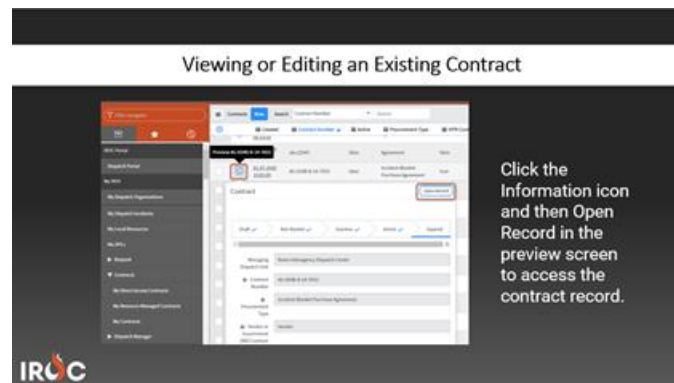
Explain:

- To view or edit existing contracts, choose the desired module from the application navigator; the contracts associated with your dispatch center will be displayed in the main content frame.
- You can use any of the filter, search, or personalize list tools from "Managing Records in DMT" to organize and search the list of contracts.
- To quickly view contract details, click the **Information** icon to the left of the record to open the Contract preview screen.
- To modify a record, click **Open Record** in the Contract preview screen and make changes on the Contract record screen as needed. When done, click **Update**.
- At any time while working on a contract, right-click in the header bar and click **Save** to save your work without leaving the screen, click **Insert** to create the record and be redirected to the previously visited screen, or click **Insert and Stay** to create the record and remain on the current screen.

## Slide 7: Action Buttons for Viewing and Editing Contracts
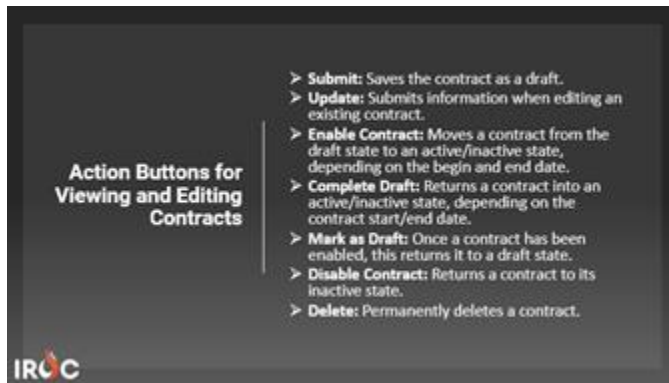
Describe the action buttons that appear on contract record screens:

- **Submit:** Click to save the record, which places the contract in the draft state.
- **Update:** Click to save information when editing an existing contract.
- **Enable Contract:** Moves a contract from the draft state to an active/inactive state, depending on the begin and end date. A contract in the draft state must be enabled to make it available for use in IROC. You can enable a contract as soon as you create it or at any time after it is created.
- **Mark as Draft:** Once a contract has been enabled, click this to return it to its draft state and make changes.
- **Complete Draft:** Click to return a contract into an active or inactive state, depending on the contract start/end date.
- **Disable Contract:** Click to remove a contract from being available. Doing so places the contract in an inactive state so that it is no longer available for use. The contract has not been deleted and can be enabled again if needed.
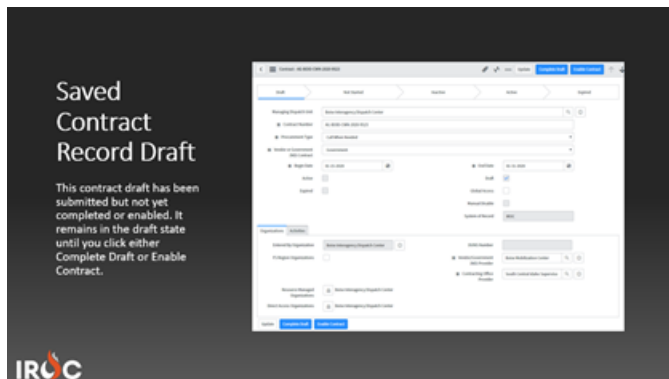
Explain:

- You will see examples of these action buttons on the following slides.
- You will not be able to complete the draft if the contract creator has indicated that the vendor/government non-dispatch provider could not be found in the list.
- After clicking **Enable Contract** or **Complete Draft**, the contract will either move to the active state if the begin date has passed or will remain in the inactive state until the begin date arrives.

Slide 8: Contract New Record–Draft
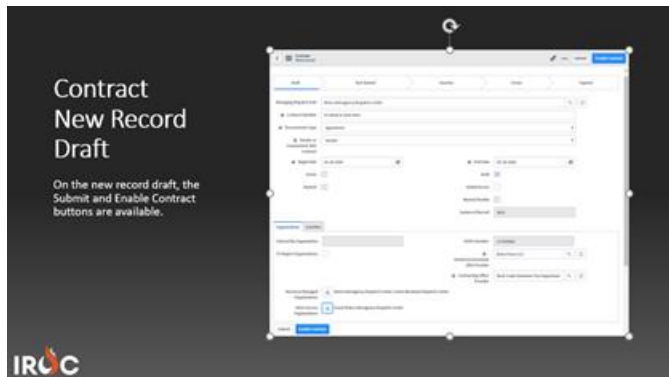
Explain: This slide shows a new draft contract that has not yet been submitted or enabled. If the begin date has not passed, clicking **Enable Contract** will bring up an alert stating that it will remain inactive until the start date has passed, at which time the contract will be enabled and active.

## Slide 9: Saved Contract Record–Draft

Explain: This slide shows a new draft contract that has been submitted but not completed or enabled. This essentially means that you have saved the information, but the record is not complete. To complete the draft but keep it in its draft state, click **Complete Draft**. To complete the draft and enable the contract, click **Enable Contract**. The **Submit** button is now an **Update** button because the record has been submitted, so any new changes are considered updates.

Slide 10: Enabled Contract
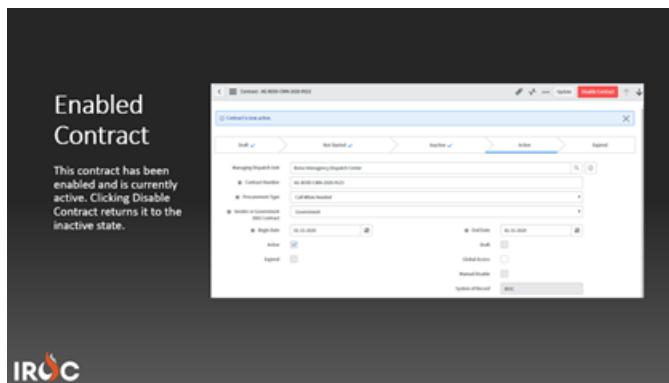
Explain: This slide shows a contract that has been enabled and is currently active. Clicking the **Disable Contract** button will return this to an inactive state. If the end date has already passed, clicking the **Disable Contract** button will return it to the draft state.

Slide 11: Adding or Removing Organizations
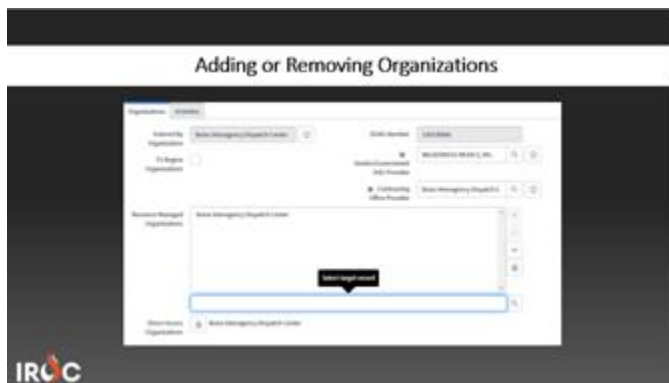
Explain:

- To add or remove resource managed organizations or direct access organizations, you must be a dispatch manager at the organizational unit that is the managing dispatch of the contract.
- Navigate to the desired contract and click the **Lock** icon by the field you want to modify.
- To remove an organization from the list, select it and click the **Delete** icon to the right of the list.
- To add an organization, click the **Search** icon and choose from the list or perform a type-ahead search in the search field.
- You can add or remove multiple items at once by clicking the **Add/Remove Multiple** icon. This opens the Edit Members screen, where you can select items in the Collection field to move them to the List field to add organizations or do the opposite to remove them.
- When done, click **Save** in the Edit Members screen and then click the **Lock** icon again to save your changes to the list.
- In both the Edit Members screen and the unlocked list, you can use Shift-Click, Ctrl-Click, or Click and Drag to add or remove more than one organization at once.

Slide 12: Adding or Removing Resources
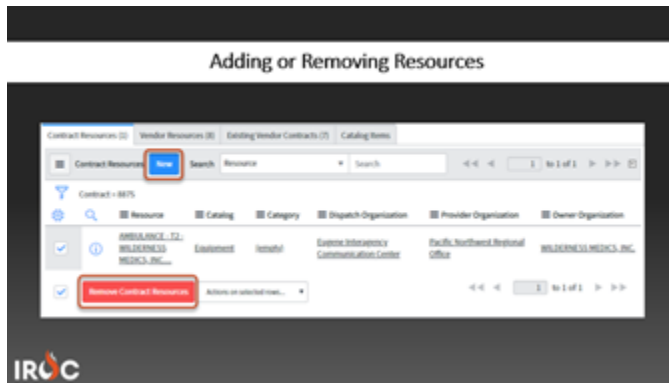
Explain: To add a resource to a contract record, your current dispatch center must be the managing dispatch of the contract or be designated as a resource managed organization for the contract.

Show how to add or remove a resource:

1 Navigate to the desired contract record and scroll down to the Contract Resources tab at the bottom of the contract screen. This tabbed section appears below the Organizations and Activities tabs.

2 To delete a resource, check the box to the left of the resource and then click Remove Contract Resources. You can select more than one resource at once.

3 To add a resource to a contract, click **New** in the Contract Resources tab.

4 In the Contract Resource: New Record screen, the **Contract Number** will automatically populate.

5 Choose the **Resource** from the list.

6 Click the **Lock** icon to set the desired qualifications. Click the **Lock** icon again to save your changes.

   • The **Qualifications** field is not required information.

7 When done, click **Submit.**

Explain:

• A resource cannot be added to an exclusive-use contract if already assigned to any other type of contract.

• A resource can be added to multiple non-exclusive use contracts.

• A resource that has a master roster, that is assigned to a position on a master roster, or that is assigned as an alternate to a position on a master roster cannot be added to a contract.

Slide 13: Objectives Review
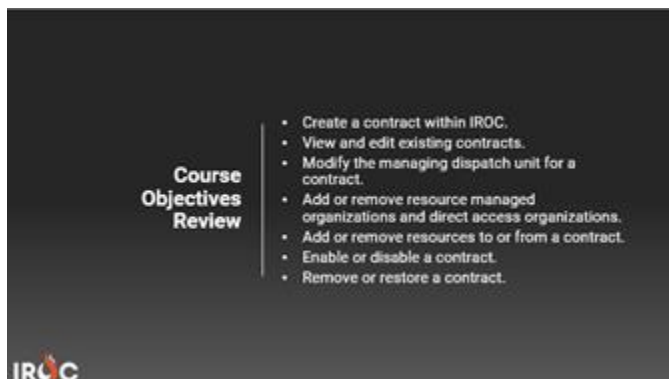
Take a moment to review the objectives for this course and respond to any questions before concluding the training session.